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Form RE-2

Date/Time Stamp:

## EMPLOYEE PRE-TRAVEL AUTHORIZATION

**Pre-Travel Filing Instructions:** Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at [ethics.senate.gov](http://ethics.senate.gov). Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Katie Peake

Employing Office/Committee: Senator Richard Shelby

Private Sponsor(s) (list all): World Vision Inc, Save the Children

Travel date(s): September 28, 2019 - October 5, 2019

*Note: If you plan to extend the trip for any reason you must notify the Committee.*

Destination(s): Malawi

Explain how this trip is specifically connected to the traveler's official or representational duties:

I am one of two staffers responsible for Senator Shelby's portfolio regarding the State and Foreign Operations Appropriations Subcommittee, which funds Global Health Programs and Development Assistance. These topics are the trip's main focus, and a greater understanding of these issue sets will benefit my ability to advise on policy.

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

8/29/19  
(Date)

Katie Peake  
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Richard Shelby hereby authorize Katie Peake  
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

8/29/19  
(Date)

Richard Shelby  
(Signature of Supervising Senator/Officer)

## Peake, Katie (Shelby)

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**From:** Amanda Medlock - US <amedlock@worldvision.org>  
**Sent:** Thursday, August 22, 2019 11:21 AM  
**To:** Peake, Katie (Shelby)  
**Subject:** INVITE | Join Congressional Learning Trip Sept 28-Oct 5 with World Vision and Save the Children  
**Attachments:** Invitation Letter - World Vision\_Save the Children Congressional Staff Learning Trip to Malawi - Katie Peake.pdf

Dear Katie,

I hope you're doing well! I want to introduce myself, as I haven't yet had the chance to meet with you. My name is Amanda Medlock, and I'm the Global Health policy lead at World Vision, a faith-based international humanitarian organization operating in nearly 100 countries around the world. I realize you're familiar with World Vision as you've met with Davis Rhodes, a volunteer advocate, earlier this month. Davis so appreciated your time and consideration, and I am excited to continue our work together.

I'm reaching out to personally extend an invitation for you to join World Vision and Save the Children on a Congressional Learning Trip to Malawi September 28th – October 5th (including travel dates). The learning trip will focus on the ways U.S foreign assistance has been contributing to Malawi's development, particularly related to maternal and child health. You will have the opportunity to engage directly during the trip with the U.S. Mission in Lilongwe, the Malawian government, and program beneficiaries. This is a privately sponsored trip with all expenses paid by World Vision and Save the Children, and please note the attached formal invitation for more information. We'd be thrilled if you can make it!

Space is limited, so please let me know whether or not you are able to join us as soon as you are able. Please also feel free to reach out with any questions.

Many thanks,  
Amanda

### Amanda Medlock

Senior Advocacy Associate – Global Health

Advocacy and Government Relations | International Programs Group | World Vision US

Phone 202.572.6522 | [amedlock@worldvision.org](mailto:amedlock@worldvision.org) | Skype - amandamedlock

300 I Street NE : Washington, DC 20002 USA

WE BELIEVE IN CHILDREN

[www.WorldVision.org](http://www.WorldVision.org)

World Vision is a Christian humanitarian organization dedicated to working with children, families, and their communities worldwide to reach their full potential by tackling the causes of poverty and injustice.

This transmission is intended for the sole use of the individual and entity to whom it is addressed, and may contain information that is confidential and may not be disclosed under applicable law. You are hereby notified that any dissemination, distribution, or duplication of this transmission by someone other than the intended addressee or its designated agent is strictly prohibited. Thank you.





August 22, 2019

Katie Peake  
Legislative Correspondent  
Senator Richard Shelby

Dear Katie:

World Vision and Save the Children are pleased to invite you on a unique Learning Trip to Malawi. There, you will have the opportunity to see firsthand how U.S. investments are working to address Malawi's key development challenges and improve the health of vulnerable populations. The trip will take place from September 28 – October 5, 2019 (including travel days) and include meetings with U.S., Malawian, and NGO partners, visits to program sites in the field, and interactions with community workers and those who benefit from these programs.

We hope this trip will be a resource for your office as you consider the U.S. Government's role in overseas development assistance, in particular maternal and child health, nutrition, and early child development. On the trip, you'll visit World Vision, Save the Children, and partner programming focused on solving key challenges in these areas. You'll have the opportunity to interact with community workers and beneficiaries, as well as witness innovative development solutions that are empowering hundreds of thousands of Malawians. You'll also dialogue with government officials who implement these solutions on a local and national stage.

Despite over 50 years of peaceful independence, Malawi remains one of the poorest countries in the world, with more than half of the country's 19 million people living below the poverty line. In FY18, Congress appropriated more than \$250 million for foreign assistance to Malawi, with more than 75 percent supporting the health sector. Although Malawi continues to score poorly on major health indicators for maternal, infant, and under-5 mortality, Malawi has achieved dramatic gains by focusing on the improved delivery of essential health services. The Government of Malawi reduced maternal mortality by 53 percent between 1990 and 2013, and Malawi is one of few sub-Saharan African countries that achieved Millennium Development Goal (MDG) 4 for child survival by 2015. Even with the gains in child health, 37 percent of Malawian children suffer from chronic malnutrition. Over a third of established positions in the health sector are vacant, and there is a perpetual shortage of qualified health workers in facilities across the country. Such tremendous health challenges, combined with constrained economic resources and marginalized women and youth, place a significant burden on the health system. USAID programs improve social development and increase sustainable livelihoods. Our partnership with the government and Malawians is based on true accountability and collaboration.

We hope that you will be able to participate in this exciting educational opportunity. Please feel free to reach out if you have any questions.

Sincerely,

Robert Zachritz  
Vice President, Advocacy & Government Relations  
World Vision US

Michael Klosson  
Vice President, Policy and Humanitarian Response  
Save the Children

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## PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors):  
World Vision Incorporated and Save the Children
2. Description of the trip: Educational trip to view international development programs on maternal and child health, nutrition and livelihoods in Malawi, with a focus on US government supported programs
3. Dates of travel: September 28, 2019 - October 5, 2019
4. Place of travel: Malawi - Lilongwe, Mangochi, Blantyre
5. Name and title of Senate invitees: See Addendum A
6. I *certify* that the trip fits one of the following categories:  
☐ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.  
- OR -  
☒ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.  
- AND -  
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:  
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.  
- AND -  
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

☒ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

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11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

World Vision is coordinating international and domestic travel arrangements and site visits. Save the Children is coordinating in-country meetings with US and Malawi governments and site visits. Both organizations are jointly coordinating all other planning and conducting of the trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

World Vision is a child-focused development organization operating in Malawi since 1982. Save the Children has been working in Malawi since 1983 and works to ensure children are protected and healthy. The trip relates to the sponsor missions by highlighting how health issues in Malawi impact poverty.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

Over the past 6 years, World Vision has sponsored 10 Congressional trips. Save the Children has not previously sponsored Congressional trips in recent years.



15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Each sponsor hosts congressional briefings, educational meetings, and provide educational materials for congressional offices to assist with understanding of foreign affairs issues, particularly as they relate to children and their families.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$4,000 (See addendum B)	\$711 (See addendum B)	\$315 (See addendum B)	\$120 (See addendum B)
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

B, the trip is organized specifically with regard to congressional participation

18. Reason for selecting the location of the event or trip

Malawi is a priority country for several U.S. government health programs, which is the focus area for the trip, and both World Vision and Save the Children have strong capacity in the country.

19. Name and location of hotel or other lodging facility:

President Walmont Hotel (Lilongwe, Malawi), Sunbird Ku Chawe Hotel (Zomba, Malawi), Sunbird Mount Soche Hotel (Blantyre, Malawi)

20. Reason(s) for selecting hotel or other lodging facility:

All three hotels were chosen due to adequate security and proximity to meetings and site visits.





*(to be completed by each additional sponsor)*

I hereby *certify* that the information contained on pages 1-4 of the certification form and any accompanying addenda, all submitted in connection with the September 28-October 5, 2019 trip  
to Malawi is true, complete, and correct.  
*Dates of Travel (Month Day, Year)*  
*Place of Travel*

Name and Title: Jill Carney, Associate Director of Global Health and Development Policy

Name of Organization: **Save the Children**

Address: 899 N. Capitol St. NE, Suite 900

Telephone Number: 202-794-1869

Fax Number:

E-mail Address: [jcarney@savechildren.org](mailto:jcarney@savechildren.org)

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# Malawi Congressional Staff Learning Trip

September 28 – October 5, 2019

## Transit Day – Saturday, September 28

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11:00am Depart Washington, D.C. from Dulles to Lilongwe on Ethiopian Airlines

## Day 1 – Sunday, September 29

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3:30pm Arrival in Malawi – Staff will be at the airport to greet the group.

4:00pm–5:15pm Transit to President Walmont hotel and check in.

6:30pm–8:00pm Welcome working dinner with World Vision and Save the Children Malawi staff. Overview of the two organizations and programs in Malawi.

Overnight: President Walmont, Lilongwe

## Day 2 – Monday, September 30

Location: Lilongwe

Attire: Business Casual

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8:30am–9:30am Working breakfast. Security and protocols briefing.

9:30am–11:30am USAID Mission Briefing with Mission Deputy Director Catie Lott and representatives from Maternal and Child Health, Nutrition, Education and Food Security teams. Discussion will focus on U.S. government investments, strategies, and priorities in Malawi, with the goal of giving trip participants an improved understanding of the U.S. government's role in these sectors. In particular, we will focus on the health sector as the primary focus area for the trip. This discussion will help set the stage for field visits and give context to the work that will be seen over the course of the trip.

11:45am Transit to Latitudes Restaurant for lunch

12:00pm–1:30pm Working lunch with World Vision and Save the Children Malawi staff and other development partners. Debrief of meeting with USAID and discussion of challenges and opportunities for partnership with the US government from the perspectives of implementing partners. Invited partners include Management Sciences for Health, the World Food Program, and Baylor University

1:30pm–2:00pm Transit to Malawi Ministry of Health.

2:00pm–3:30pm Meeting with Malawi Ministry of Health officials, including Minister of Health and Population Hon. Jappie Mhango and other technical experts on maternal and child health, nutrition, HIV/AIDS, and malaria. Discussion of the current health challenges in Malawi and priorities for the government, including efforts to improve domestic funding for global health and strategies to address the leading causes of death for mothers and children. Meeting will help grow understanding of the role of the Ministry of Health and Population and how it works in collaboration with the U.S. government.



4:00pm–4:30pm	Transit to hotel
6:00pm–7:30pm	Working dinner – debrief of the day and review of next day's itinerary.

Overnight: President Walmont, Lilongwe

### Day 3 – Tuesday, October 1

Location: Mangochi

Attire: Casual

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7:00am	Breakfast at President Walmont and check out
8:00am–8:45am	Transit to Lilongwe airport for charter flight to Mangochi
8:45am–9:30am	Check in for charter flight
9:30am–10:30am	Flight to Mangochi – scene setter discussion in transit with pre-reads on the project visits.
11:00am–12:30 pm	Visit to Mangochi – Adolescent Girls and Young Women (AGYW) and Global Fund Projects: highlight comprehensive approach to empower AGYW through encouraging young girls to stay in school, improving hygiene awareness, and facilitating village savings and loans for women doing handmade crafts. Hear testimonies of transformation from some program beneficiaries from out-of-school and in-school clubs
12:30pm–1:30 pm	Working lunch in Mangochi. Discussion with World Vision staff on outcomes of the AGYW and Global Fund Projects; time for Q&A
1:30pm– 4:00pm	Visit to a village clinic: demonstrate comprehensive approach to reducing malaria mortality and morbidity through expansion of vector control, testing and treatment at healthy facility and community level, and social and behavior change communication.

4:00pm–5:15pm	Transit to Sunbird Ku Chawe Hotel
6:30pm–8:00pm	Working dinner– debrief of the day and review of next day's itinerary

Overnight: Sunbird Ku Chawe Hotel, Zomba

### Day 4 – Wednesday, October 2

Location: Machinga/Zomba

Attire: Casual

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7:30am	Breakfast and hotel check out
8:30am–10:00am	Visit to Machinga District Hospital. Brief meeting with District Health Management Team to discuss US government support of the hospital, followed by a tour of several Wards, including maternity and pediatric.

10:30am–12:00pm	Visit to Mlomba Health Centre and meet with the Health Action Committee, which is supported by the Machinga Demand Creation and Social Accountability Project, funded by USAID. Hear from the Committee, comprised of community volunteers, about the role they play in facilitating care and liaising with both Health Centre beneficiaries and providers to improve health services.
12:30pm–1:30pm	Working buffet lunch. Discussion with World Vision staff on outcomes of the Machinga Demand Creation Project and time for Q&A
1:30pm–2:30pm	Transit to Save the Children program.
2:30pm–4:00pm	Visit to Gologota Primary School to observe implementation of a Learner Treatment Kit clinic, which aims to improve school attendance by training teachers to diagnose and provide treatments for malaria. Tour the school—including new gender-specific hygiene facilities that promote water, sanitation and hygiene (WASH)—observe Inclusive Literacy Boost lessons and meet with teachers and school authorities.
4:00pm–5:00pm	Transit to Blantyre and hotel check in
6:30pm–8:00pm	Working dinner – review of next day's itinerary

Overnight: Sunbird Ku Mount Soche, Blantyre

### Day 5 – Thursday, October 3

Location: Blantyre

Attire: Casual

7:00am	Breakfast and check out of hotel
7:45am–8:30am	Transit to Libuda Village Health Outreach Clinic
8:30am–10:00am	Visit Libuda Village Health Outreach Clinic—connected by the Mdeka Health Centre—operated by Save the Children and funded through the Pfizer Foundation. This clinic focuses on Family Planning (FP) and Immunization (EPI). The project promotes access to services by integrating FP and EPI to allow the community members access services closer to them and reducing the number of visits in accessing services. Discussion with 2-3 beneficiaries of the program on how it has benefited them and their family.
10:00am–10:45am	Transit to ENACT project.
10:45am–12:30pm	Meet with staff, community leaders, and beneficiaries of the ENACT (Engendered Nutritional and Climate Resilience Actions in Vulnerable Communities Together) project, operated by Save the Children, which focuses on improving nutrition, food security and building resilience for vulnerable communities and households. View demonstrations and discuss how the project has supported households with nutrition, cooking, village savings and loan, kitchen gardens, livestock, WASH, and disaster risk reduction activities.
1:00pm–2:00pm	Working lunch. Discussion with Save the Children staff on ENACT project and outcomes, including time for Q&A.





## Addendum A

Jess Pavel, Legislative Assistant  
Megan Reiss, Nat'l Security Policy Adviser  
Daisy Beldsoe-Herring, Legislative Aide  
Katie Wright, Health Policy Adviser  
Matt Williams, National Security Advisor  
Katie Peake, Legislative Correspondent  
Devin O'Brien, Legislative Correspondent  
Allison Feikes, Legislative Assistant  
Kate Hunter, Legislative Assistant  
Judd Gardner, Legislative Assistant  
Igor Khrestin, National Security Advisor  
Kyle Green, Legislative Correspondent  
Dylan Clement, Legislative Correspondent  
Katherine Jackson, Professional Staff  
Mike Callesen, Policy Analyst  
Cassie Leonard, Legislative Assistant  
Nick Rawls, Policy Adviser  
Wayne Jones, Policy Adviser  
Kendall Garraway, Legislative Assistant  
Sam Fellman, Policy Adviser  
Ani Toumajan, Legislative Assistant  
Liz Lewis, Senate Foreign Relations  
Katie Perry, Legislative Correspondent  
Robert Waisanen, Legislative Assistant  
Katherine Close, Legislative Aide  
Erum Ali, Policy Adviser  
Maggie Angel, Legislative Correspondent  
Bethany Carter, Legislative Assistant

Nic Adams, Nat'l Security Adviser  
Dan Gerig, Legislative Assistant  
Emily Crow, Legislative Correspondent  
Brett Fetterly, Nat'l Security Adviser  
Paris Cervantes, Legislative Correspondent  
Sophia Lalani, Policy Adviser  
Kevin Lawson, Sr Policy Adviser  
Brandt Anderson, Nat'l Security Adviser  
Megan Zavertrnik, Nat'l Security Adviser  
Don Archer, Legislative Assistant  
Amber Bland, Legislative Counsel  
Bill Bode, Legislative Assistant  
Elana Broitman, Senior Adviser  
Josh Carter, Nat'l Security Adviser  
Grace Cason, Legislative Aide  
Dan Dunham, Legislative Assistant  
Sally Farrington, Legislative Correspondent  
Cole Lyle, Legislative Assistant  
Zach Lewis, Legislative Correspondent  
Edward Linczer, Legislative Assistant  
Nathan Paxton, Legislative Assistant  
Annie Humphrey, Legislative Correspondent  
Susan Occhipinti, Legislative Assistant  
Liz Banicki, Legislative Assistant  
Scott Graber, Legislative Assistant  
Baxter Carr, Legislative Assistant

## Addendum B

Comparison of U.S. Department of State per diem rates for Malawi and the daily expenses for this trip:

- U.S. Department of State daily maximum per diem rates for Malawi (including lodging and M&IE):
  - Lilongwe – \$236 (lodging \$150, M&IE \$86)
  - Blantyre – \$230 (lodging \$146, M&IE \$84)
  - Zomba (Mangochi) - \$198 (lodging \$117, M&IE \$81)
- Daily expenses for this trip:
  - September 29 – City: Lilongwe  
Lodging - \$147, meals - \$30 (good faith estimate), total = **\$177**
  - September 30 – City: Lilongwe  
Lodging - \$147, meals - \$75 (good faith estimate), total = **\$222**
  - October 1 – City: Zomba/Mangochi

Lodging - \$130 (option is over per diem but was chosen due to proximity to site visits and appropriate security), meals - \$50 (good faith estimate), total = \$180

- October 2 – City: Blantyre

Lodging - \$140, meals - \$50 (good faith estimate), total = \$190

- October 3 – City: Lilongwe

Lodging - \$147, meals - \$60 (good faith estimate), total = \$207

- October 4 – City: Lilongwe

Lodging - \$0 (overnight flight), meals - \$50 (good faith estimate), total = \$50

- Transportation expenses:

- In country transportation (rented buses and Toyota Prado SUVs) = \$300 per person
- In country roundtrip charter flights - \$1500 per person
- Roundtrip international coach flights - \$2200 per person

Other estimated expenses:

- Visa expenses - \$120 per person

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228-212 for Commuter Category

**Effectivity: DORNIER 228-100/-200/-101/-201/-202 for Normal Category  
228-212 for Commuter Category**

